

**Commonwealth of Massachusetts  
Executive Office of Health and Human Services**

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## **Virtual Gateway**



## **Enterprise Service Management School Based Health Center (SBHC)**

Fall 2006 Release 3 Version 1



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## Module 1: Getting Started

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### Introduction

The Virtual Gateway is a single point on the internet for accessing programs and services offered by the Executive Office of Health and Human Services (EOHHS).

Enterprise Invoice Management/Enterprise System Management (EIM/ESM) is a web-based billing and service delivery reporting system for Purchase of Service (POS) providers and is one of the many services offered through the Virtual Gateway. Use of specific EIM/ESM functionality is discussed in later modules.

This module discusses the following topics:

- What is the Virtual Gateway
  - System Requirements
  - Accessing the Virtual Gateway
  - Accessing provider services (including EIM/ESM)
  - Password management
- 

### What is the Virtual Gateway?

The goal of the Virtual Gateway is to streamline service access and coordinate service delivery. It serves three important groups:

- Internal Health and Human Services staff
- Service provider staff
- Consumers

In addition to EIM/ESM, the Virtual Gateway also offers:

- **Catalog:** An online catalog with descriptions of several of the most widely used programs in Health and Human Services.
  - **Screening & Referral:** A short online survey for consumers and providers to determine potential eligibility for select EOHHS programs. Multiple services can be assessed at the same time.
  - **Common Intake:** A single, online data collection tool for registered providers to create applications for multiple EOHHS programs on behalf of clients (login required).
-



## What is the Virtual Gateway?

(continued)

- **Transitional Assistance Gateway:** An online inquiry tool for registered agencies to view secure case management information for various transitional assistance programs, including Food Stamps, financial assistance, and homeless services (login required).
- **Provider Data Management:** An online service that gives *Purchase of Service (POS)* providers a single place to view, upload and edit information commonly requested by Health and Human Services agencies. The service also provides EOHHS agencies with a single place to view provider information (login required).
- **Service and Transition Planning:** An online tool for registered EOHHS staff and providers to support collaborative treatment planning and referral services for certain children served by EOHHS (login required).
- **IRIS Services for Deaf and Hard of Hearing Consumers:** An online service for service providers to request ASL interpreter or CART services on behalf of consumers; for ASL interpreters and CART reporters to post availability schedules, review and apply for open jobs (login required).
- **Homeless Management Information Systems:** The *Homeless Management Information Systems (HMIS)* perform data collection to capture information about citizens who experience being homeless over a period of time (login required).
- **Mental Retardation Quality Management Reporting (HCSIS):** A service for Purchase of Service providers, Department of Mental Retardation (DMR) staff, human rights coordinators, and others to file clinical information and reports on incidents, medication occurrences, restraints, and investigations for DMR clients (login required).
- **Senior Information Management System (SIMS):** An online data collection, case management, and reporting tool for Executive Office of Elderly Affairs (EOEA) agencies and providers. It enables users to track various programs for elders, including intake and referral, home care, nutrition, clinical assessments, and more (login required).



## System Requirements

### System Requirements for EIM/ESM and the Virtual Gateway

All computers used to access the Virtual Gateway require Internet Explorer 6.0 or higher.

For the EIM/ESM application, the minimum system requirements are:

- Windows (98, 2000 or XP Business)
- Internet Explorer 6.0 or higher
- 800x600 screen resolution
- 300MHz CPU and 128MB RAM

Additionally, the preferred system features to enhance the performance of EIM/ESM are:

- Windows XP (Business Class)
- 1024x768 screen resolution
- 500MHz CPU and 256MB RAM

Acceptable Alternatives:

- Operating System
  - Mac OS X
- Browsers:
  - Safari (Mac)
  - Firefox
  - Netscape

**Note:** Testing on the EIM/ESM application has not been conducted on these alternative platforms therefore compatibility issues may result.

**Tip:** If a lower screen resolution is selected, then the user needs to select the “Smaller” text size.

1. Select the View menu from the Internet Explorer browser.

Select **Text Size>>Smaller**.



## Accessing the Virtual Gateway

Access to EIM/ESM is through Virtual Gateway Provider Services.  
To Access Provider Services:

1. Open an Internet Explorer session.
2. Type the web address <http://www.mass.gov/eohhs> in your browser.
3. Select **Provider Services Gateway ENTER>>**

The screenshot shows the Health and Human Services website. The top navigation bar includes links for HOME, CONSUMERS, PROVIDERS, RESEARCHERS, and GOVERNMENT. The main content area features a 'Welcome to the GATEWAY Health & Human Services' banner. Below the banner, there is a section for 'Vocational Rehabilitation' and a 'News & Updates' sidebar. The 'Provider Services Gateway ENTER >>' link is highlighted with a red circle.

**Tip:** Once you are in the Virtual Gateway, you must use the navigation tools that are part of the application *not* your internet browser's **Back** and **Forward** (←→) buttons.





## Accessing the Virtual Gateway (continued)

*You are directed to the Business Services page for login.*

Health and Human Services

Mass.gov

April 13, 2006

CONSUMER PROVIDER RESEARCHER GOVERNMENT

Mass.gov Home State Government State Online Services

### Virtual Gateway Business Services

The Virtual Gateway offers a new way to access health and human service programs. To get started, login to the right, or learn how to [become an authorized user](#). The following online services are currently available:

**Catalog:** An online catalog with descriptions of several of the most widely used programs in Health and Human Services.

**Screening & Referral:** A short online survey for consumers and providers to determine potential eligibility for select EOHHS programs. Multiple services can be assessed at the same time.

**Intake:** A single, online data collection tool for registered providers to create applications for multiple EOHHS programs on behalf of clients. (Login required.)

**Homeless Management:** An online data collection, case management, and reporting tool for registered homeless shelters and providers to manage daily operations within their organizations. (Login required.)

**Mental Retardation Quality Management Reporting (HCSIS):** An online service for providers and registered EOHHS staff to report and monitor quality management information for individuals served by the Department of Mental Retardation. (Login required.)

Search

Health & Human Services

Login

Username

Password

(case-sensitive)

Submit

[Forgot password?](#)

**Virtual Gateway Help Desk:**  
1-800-421-0938  
1-617-988-3301 (TTY)  
9 AM - 5 PM, Monday - Friday

4. Enter **Username** and **Password**.

5. Click **Submit**.

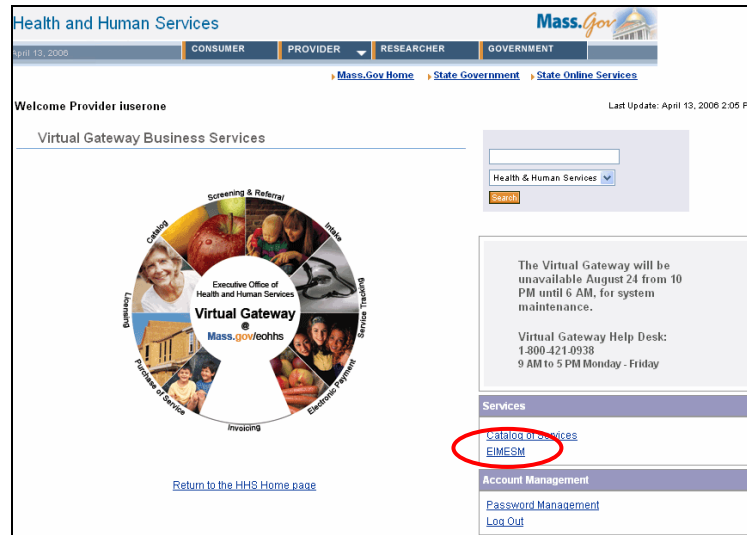
*The **Virtual Gateway Business Services** page displays.*

**Note:** Security requires that each person have a *Virtual Gateway* username and password.



## Accessing Virtual Gateway Services

The **Virtual Gateway Business Services** page displays after you have successfully entered your username and password. You can select the service(s) you wish to access from this page. You can call the Virtual Gateway Help Desk if you need any assistance: 1-800-421-0938.



**Note:** Once you are logged in, you will have access to EIM/ESM.

## Password Management

All users must change their password at first login.

After your initial login, you can change your password at any time by clicking on the [Password Management](#) link.

Password policy rules:

- The user will be assigned an ID and temporary password sent through e-mail by the Virtual Gateway help desk
- The password must contain between 8 and 12 characters and have at least 1 alpha and 1 numeric character
- Passwords are case-sensitive
- Users will be automatically logged out of the system after 30 minutes of inactivity



## Password Management

**Important:** You will need to disable any pop-up blocker in your browser to allow the change of password screen to appear. Contact your network administrator if you need assistance with this process.

Once you login, you can change your password.

To change your password:

1. Access the Business Services page.
2. Click the Password Management link.  
The Change Password popup window appears.
3. Type your new password twice.
4. Click **Submit**.
5. Click **Close**.

## Virtual Gateway Help Desk Information

The Virtual Gateway Help Desk is available to assist with:

- General questions regarding the Virtual Gateway
- Technical questions or system issues
- Questions regarding how to use EIM/ESM
- Password resets

Please be prepared to provide the following:

- Name, organization, phone number, email address
- Module/page/field you were working on (if applicable)



- 
- Description of the issue or error message
  - Perceived criticality

You can reach the Virtual Gateway Help Desk at 1-(800)-421-0938 from 9 a.m. to 5 p.m. Please leave a voice mail if calling after hours.

**Note:** If the Help Desk is unable to resolve your issue while on the phone, a ticket number will be issued along with any relevant workarounds.

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## Module 2: Introduction to EIM/ESM

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### Introduction

The EIM/ESM service provides functionality for a variety of provider and agency users. These functions are presented as modules within EIM/ESM. Modules that are required to complete day-to-day responsibilities are covered in this user manual. Users have access to their required modules when logged into EIM/ESM. Other modules will not be accessible.

Each module in the EIM/ESM service has a corresponding module in one of the EIM/ESM user manuals. This module discusses the following topics:

- What is EIM/ESM?
  - EIM/ESM Overviews
  - Benefits of EIM/ESM
- 

### What is EIM/ESM?

Enterprise Invoice Management/Enterprise Service Management (EIM/ESM) is a web-based billing and service delivery reporting system for Purchase of Service (POS) providers.

*Enterprise Invoice Management (EIM)* is an EOHHS-wide invoicing and service delivery reporting tool which coordinates invoicing and reporting across POS programs, agencies, and providers.

*Enterprise Service Management (ESM)* supports providers contracted through the Department of Public Health (DPH) with a client management and service tracking tool. ESM fully integrates and coordinates delivery and administration of care across DPH programs, bureaus, and providers.

This manual focuses on client and service management functionalities available in ESM. Additional information about EIM/ESM can be found under the Provider tab of the EOHHS web page: [www.mass.gov/eohhs](http://www.mass.gov/eohhs).

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**EIM Overview**

EIM (Enterprise Invoice Management) enables provider organizations to invoice or bill EOHHS agencies for certain Purchase of Service (POS) contracted services.

**Invoices:**

- Are generated and submitted by providers through EIM
- Are automatically adjudicated within EIM
- Adjudication results can be viewed in EIM

**PRC (Payment Request for Commodity):**

- Are generated within EIM
  - Can be tracked through EIM
- 

**ESM Overview**

ESM (Enterprise Service Management) enables provider organizations to maintain their client roster, program enrollments, service plans, case management plans, and encounter documentation.

**Client Management:**

- Accepts electronic applications
- Maintains client information

**Service Management:**

- Determines eligibility
- Enrolls clients
- Manages authorizations
- Enables service planning and tracking

**Note:** Initially, ESM will be deployed for DPH programs only.

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## **Benefits of EIM/ESM**

How does the EIM/ESM service benefit providers?

- **Simplifies** reporting and invoicing for purchased services
- **Enables** providers to track invoices through the adjudication and payment process, providing information about status, adjustments, date of payment, etc.
- **Provides** unprecedented enterprise reporting capabilities to provider organizations as well as agencies

What are the benefits of EIM?

- Provides expedited payment
- Provides real-time payment processing
- Offers access to up-to-date financial data

What are the benefits of ESM?

- Provides access to dynamic data collection and reporting
- Provides online, client-based enrollment
- Enhances referral throughout treatment episode







## Module 3: EIM/ESM Navigation Basics

### Introduction

Navigation is simple and consistent throughout each module in EIM/ESM. The topics in this module will help you:

- Understand the modular structure of EIM/ESM
- Navigate through each module
- Search for records

### Module Links

When a user logs into EIM/ESM, the **module links** are immediately available at the top of the page.

The screenshot shows the EIM/ESM user interface. At the top, there is a header with the text "Health and Human Services" and the "Mass.gov" logo. Below this is a navigation bar with the following links: Home, Clients, Case Management, Authorizations, Billing, Contracts, Credentials, Administration, Report, Help, and Logout. The "Clients" link is highlighted. Below the navigation bar, the main content area displays a "Welcome" message, an "Alerts" section with a table of alerts, and "Tasks" and "Appointments" sections. The "Alerts" table has two columns: "Date" and "Message". The first row shows the date "09/05/2006" and the message "test". The second row shows the date "03/12/2006" and the message "This is the Clean DB Loaded from the Covansys clean up 3/12 connected to Pilot Oras from 5/26". Below the alerts, it says "Displaying 1-2 of 9 | View all Alerts". The "Tasks" section says "No Tasks Exist." and the "Appointments" section says "No Appointments Exist." At the bottom of the screenshot, there is a section titled "EIM/ESM USER CERTIFICATION" with a paragraph of text and two sections: "FOR AGENCY USERS" and "FOR PROVIDER USERS". The "FOR AGENCY USERS" section has two bullet points: "You have been delegated signature authorization by your agency to approve the document (and supporting documentation) as part of your agency's internal control process; OR" and "The document you are processing (and any supporting documentation) has received prior written approval by an authorized signatory of the agency, Secretariat, and other required entities, and that a copy of any such written approval is available at the agency referencing the EIM or ESM document number." The "FOR PROVIDER USERS" section has one bullet point: "You have been given authority by your provider organization to approve, reject, modify and submit documents through EIM and ESM." At the very bottom, it says "ALL USERS AGREE AND ACKNOWLEDGE THAT ALL INFORMATION SUBMITTED TO EIM AND ESM IS ACCURATE AND COMPLETE".

Each **module link** corresponds with a functional area: the **Clients** module provides access to eligibility and enrollment functions, the **Report** module provides access to reports, etc.

Clicking a module link to navigates you to the corresponding features.

The screenshot shows the EIM/ESM navigation bar. It contains the following links: Home, Clients, Case Management, Authorizations, Billing, Contracts, Credentials, Administration, and Report. The "Clients" link is highlighted with a red box.



## The Navigation Bar

When a module is selected, a corresponding **navigation bar** appears on the left side of the page, allowing users to navigate to related functions.

Home Clients Case Management Authorizations Billing Contracts Credentials Administration Report Help Logout

Current Location: Client > Client Search

**Client**

- » Client Search
- » Advanced Client Search
- » Case Search
- » Cross Activity Eligibility
- » Applicant Search
- » Quick Intake

**Client Search**

At least one search criteria must be entered

Last Name:  First Name:

ID:

ID Type:

Date of Birth:

The default page—the page that displays first when a module is selected—varies by module, but it is typically a search page.



## Search

Searching for records is the first step in most EIM/ESM functions. Users search for clients, invoices, contracts, etc., depending on the functions they use.

Users search by entering a value or wild card search in a criteria field.


The wild card is **%**. It can be used in alpha-numeric fields alone or with other characters:

If the criteria is...	The results will be...
%son	Thompson, Johnson, Mason
m%n	Man, Mason, Mellon

The **%** can be used alone to return all records; however, searching for all records may be slow process.

**Tip:** To narrow down search results, populate as many search criteria fields as possible (for example last name, birth date etc.)

### To search:

1. Enter criteria in a field
2. Click 

*The search results appear.*

## Search Results

Search results consist of a list of linked records:

Search Results								
Last Name	First Name	ID	ID Type	Date of Birth	Address	City	Region	State
Torres	Edward	999999999	SSN	06/28/1990				

Click the [linked field](#) to select and view the record.



## Breadcrumbs

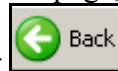
Breadcrumbs at the top of each page allow the user to navigate to previous pages easily.

**Current Location:** [Client](#) > [Client Search](#) > [Face Sheet](#) > [Client Summary](#)

In the above example, the current page displayed is **Client Summary**. To return to the Client Search page, simply click

[Client Search](#) >

. Do not use the browser



button.



## Module 4: Intake, Eligibility and Enrollment Overview

---

### Overview

<b>Who</b>	Provider Intake Staff who enroll applicants in School Based Health Centers.
<b>What</b>	<ol style="list-style-type: none"><li>1. Manage client intake information</li><li>2. Screen clients for eligibility</li><li>3. Enroll clients into a program</li></ol>
<b>When</b>	A client is created in ESM for eligibility screening and enrollment.

---





## Module 5: Searching for a Client

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### Searching for Clients

Client Search is the only way to access client records.

Client Search should be used prior to creating a new client record to determine whether the person already exists in the database. This helps avoid duplicate records.

You can use the search feature to locate records for review and enrollment.

---

### Access Client Search Page

First, log in to *ESM*.

To access the **Client Search** page:

Click the **Clients** module.

*The Client Search page appears.*

**Tip:** The **Client Search** page is the default.

The screenshot shows the ESM application interface. At the top, there is a navigation bar with various menu items: Home, Clients, Case Management, Authorizations, Billing, Contracts, Credentials, Administration, Report, Help, and Logout. The 'Clients' menu item is highlighted with a red circle. Below the navigation bar, the 'Client Search' page is displayed. On the left side of the page, there is a sidebar menu with options: Client Search, Advanced Client Search, Case Search, Cross Activity Eligibility, Applicant Search, and Quick Intake. The main content area of the page contains a search form with the following fields: Last Name (filled with 'Torres'), First Name (filled with 'Edward'), ID (empty), ID Type (a dropdown menu set to 'Select Below'), and Date of Birth (empty). A 'Search' button is located at the bottom right of the form.

### Hints:

- To add a client, enter both a first and last name.
  - The unique identifier (ID) is an alpha code only.
  - To search by the client's auto-generated unique identifier, use either the first or last name field.
-



## Search Process

Begin at the **Client Search** page.


1. Enter search criteria.
  - You can search by partial criteria in the names fields (for example, **A** returns all names beginning with A)
  - You can use the **%** wild card for all fields except social security number. Using the wild card alone in a name field returns all records; however, the response time is slower for wild card searches.
  - Available fields include:
    - First or last name
    - Date of birth
    - ID/ID Type

**Tip:** To narrow down search results, populate as many search criteria fields as possible.

2. Click 

*The search results are listed below the search criteria.*

### Client Search

Last Name:	<input type="text" value="Torres"/>	First Name:	<input type="text"/>
ID:	<input type="text"/>		
ID Type:	<input type="text" value="Select Below"/> ▼		
Date of Birth:	<input type="text"/>		

Search

### Search Results

Last Name	First Name	ID	ID Type	Date of Birth	Address	City	Region	State
<a href="#">Torres</a>	Edward	999999999	SSN	06/28/1990				

Display 1 to 1 of 1 |

3. Select the [linked field](#) from the search results.

*The **Face Sheet** page appears.*

**Important:** Review **Face Sheet** to check SBHC required eligibility data fields are populated.





## Face Sheet

The information displayed on the **Face Sheet** is collected during intake.

<b>Manage Client</b>	<b>Client #11982 : Edward A. Torres</b>																															
» Face Sheet	<b>Application Summary</b>																															
» Client Summary	<table border="1"> <tr> <th>Application Number</th> <th>Enrollment Status</th> <th>Submission Date</th> <th>Expiration Date</th> </tr> </table>						Application Number	Enrollment Status	Submission Date	Expiration Date																						
Application Number	Enrollment Status	Submission Date	Expiration Date																													
» Personal Info	<b>Client Summary</b>																															
» Referrals	<table border="1"> <tr> <th>First Name</th> <th>Middle Name</th> <th>Last Name</th> <th>Suffix</th> <th>Type</th> </tr> <tr> <td>Edward</td> <td>A</td> <td>Torres</td> <td></td> <td>Primary</td> </tr> </table>						First Name	Middle Name	Last Name	Suffix	Type	Edward	A	Torres		Primary																
First Name	Middle Name	Last Name	Suffix	Type																												
Edward	A	Torres		Primary																												
» Relations	<table border="1"> <tr> <th colspan="6">Personal Information</th> </tr> <tr> <td>Date of Birth:</td> <td>06/28/1990</td> <td>Age:</td> <td>16 Year(s) 2 Month(s) 5 Day (s)</td> <td>Gender:</td> <td>M</td> </tr> <tr> <td>Social Security Number:</td> <td>999-99-9999</td> <td>Highest Grade Completed:</td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="6">In what language do you prefer to read or discuss health related materials? English</td> </tr> </table>						Personal Information						Date of Birth:	06/28/1990	Age:	16 Year(s) 2 Month(s) 5 Day (s)	Gender:	M	Social Security Number:	999-99-9999	Highest Grade Completed:				In what language do you prefer to read or discuss health related materials? English							
Personal Information																																
Date of Birth:	06/28/1990	Age:	16 Year(s) 2 Month(s) 5 Day (s)	Gender:	M																											
Social Security Number:	999-99-9999	Highest Grade Completed:																														
In what language do you prefer to read or discuss health related materials? English																																
» Insurance	<table border="1"> <tr> <th colspan="6">Contact Information</th> </tr> <tr> <th>Address</th> <th>Type</th> <th>Effective From</th> <th>Effective To</th> <th>Restricted</th> <th>Primary</th> </tr> <tr> <td>85 Russ Street , Boston, MA, 02108</td> <td>Home</td> <td>08/28/2006</td> <td></td> <td>No</td> <td>No</td> </tr> </table>						Contact Information						Address	Type	Effective From	Effective To	Restricted	Primary	85 Russ Street , Boston, MA, 02108	Home	08/28/2006		No	No								
Contact Information																																
Address	Type	Effective From	Effective To	Restricted	Primary																											
85 Russ Street , Boston, MA, 02108	Home	08/28/2006		No	No																											
» Consents	<table border="1"> <tr> <th>Phone Number</th> <th>Extension</th> <th>Type</th> <th>Effective From</th> <th>Effective To</th> <th>Restricted</th> <th>Primary</th> </tr> <tr> <td>(617)555-7278</td> <td></td> <td>Home</td> <td>08/28/2006</td> <td></td> <td>No</td> <td>No</td> </tr> </table>						Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary	(617)555-7278		Home	08/28/2006		No	No												
Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary																										
(617)555-7278		Home	08/28/2006		No	No																										
» Single Activity Eligibility	<table border="1"> <tr> <th colspan="6">Primary Relation</th> </tr> <tr> <th>First Name</th> <th>Middle Name</th> <th>Last Name</th> <th>Type</th> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </table>						Primary Relation						First Name	Middle Name	Last Name	Type																
Primary Relation																																
First Name	Middle Name	Last Name	Type																													
» Eligibility Assessment	<table border="1"> <tr> <th colspan="6">Personal Information</th> </tr> <tr> <td>Date of Birth:</td> <td></td> <td>Age:</td> <td></td> <td>Gender:</td> <td></td> </tr> <tr> <td>Social Security Number:</td> <td></td> <td>Highest Grade Completed:</td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="5">In what language do you prefer to read or discuss health related materials?</td> <td>Relation Type:</td> </tr> </table>						Personal Information						Date of Birth:		Age:		Gender:		Social Security Number:		Highest Grade Completed:				In what language do you prefer to read or discuss health related materials?					Relation Type:		
Personal Information																																
Date of Birth:		Age:		Gender:																												
Social Security Number:		Highest Grade Completed:																														
In what language do you prefer to read or discuss health related materials?					Relation Type:																											
» Enrollments	<table border="1"> <tr> <th>Phone Number</th> <th>Extension</th> <th>Type</th> <th>Effective From</th> <th>Effective To</th> <th>Restricted</th> <th>Primary</th> </tr> </table>						Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary																			
Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary																										
» Waivers	<table border="1"> <tr> <th colspan="6">Household Characteristics</th> </tr> <tr> <td>Number of Adults:</td> <td>1</td> <td>Number of Children Living in Household:</td> <td>1</td> </tr> <tr> <td>Family Income:</td> <td>\$2,500.00</td> <td>Income Frequency:</td> <td>Monthly</td> </tr> <tr> <td>Employment Status:</td> <td></td> <td>Marital/Relationship Status:</td> <td>Never Married</td> </tr> <tr> <td>Source of Income/Support:</td> <td colspan="3">Child Support,</td> </tr> </table>						Household Characteristics						Number of Adults:	1	Number of Children Living in Household:	1	Family Income:	\$2,500.00	Income Frequency:	Monthly	Employment Status:		Marital/Relationship Status:	Never Married	Source of Income/Support:	Child Support,						
Household Characteristics																																
Number of Adults:	1	Number of Children Living in Household:	1																													
Family Income:	\$2,500.00	Income Frequency:	Monthly																													
Employment Status:		Marital/Relationship Status:	Never Married																													
Source of Income/Support:	Child Support,																															
» Services	<table border="1"> <tr> <th colspan="6">Insurance</th> </tr> <tr> <th>Insurance Name</th> <th>Type</th> <th>Policy Number</th> <th>Group Number</th> <th>Effective From</th> <th>Effective To</th> <th>Primary</th> </tr> <tr> <td>Other</td> <td>Medicaid</td> <td></td> <td></td> <td>08/28/2006</td> <td></td> <td>No</td> </tr> </table>						Insurance						Insurance Name	Type	Policy Number	Group Number	Effective From	Effective To	Primary	Other	Medicaid			08/28/2006		No						
Insurance																																
Insurance Name	Type	Policy Number	Group Number	Effective From	Effective To	Primary																										
Other	Medicaid			08/28/2006		No																										
	<table border="1"> <tr> <th colspan="6">Cultural Background</th> </tr> <tr> <td>Spanish/ Hispanic/ Latino:</td> <td>Yes</td> <td>U.S. Citizen:</td> <td>Unknown</td> </tr> <tr> <td>Ethnicity:</td> <td>Puerto Rican</td> <td>Date of entry in the U.S. :</td> <td></td> </tr> <tr> <td>Race:</td> <td>White</td> <td>Date or Year of Citizenship:</td> <td></td> </tr> <tr> <td>Country of Birth:</td> <td></td> <td>Number of Years a Citizen:</td> <td></td> </tr> <tr> <td>Comments:</td> <td colspan="3"></td> </tr> </table>						Cultural Background						Spanish/ Hispanic/ Latino:	Yes	U.S. Citizen:	Unknown	Ethnicity:	Puerto Rican	Date of entry in the U.S. :		Race:	White	Date or Year of Citizenship:		Country of Birth:		Number of Years a Citizen:		Comments:			
Cultural Background																																
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Ethnicity:	Puerto Rican	Date of entry in the U.S. :																														
Race:	White	Date or Year of Citizenship:																														
Country of Birth:		Number of Years a Citizen:																														
Comments:																																

**Tip:** You cannot edit information directly within the **Face Sheet**; however, you can easily navigate to editable forms from this page by selecting appropriate menu in the navigation bar on the left side.

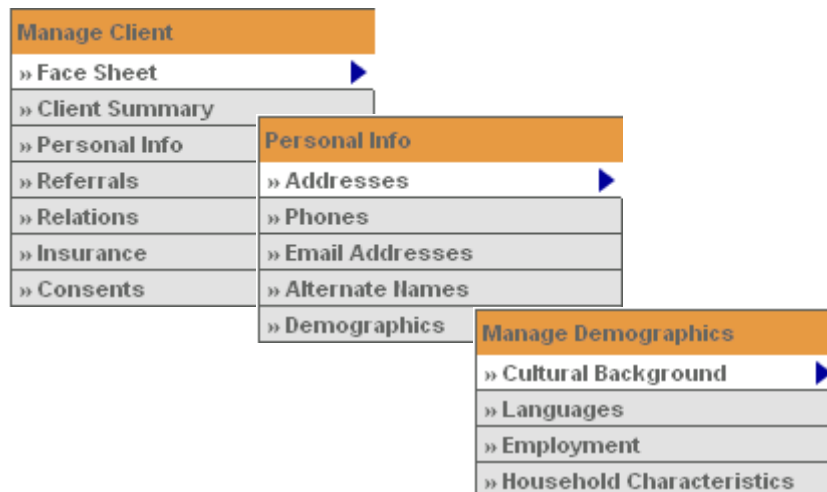


## Face Sheet Information

The **Face Sheet** is a summary of all client information available in the system.

It includes:

- client summary information
- personal information
  - contact information
  - demographic information
    - household characteristics
    - cultural background
- referrals
- relations
- insurance information
- consents





## Module 6: Adding and Editing a Client

### Client Information Overview

Your search results is a summary of all clients/students:

- who are currently enrolled in the program
- with an enrollment status that has not yet been determined
- with enrollments that have been expired

**Adding a Client** Begin at the **Client Search** page.

1. Click [add a client](#) link.

*The Add Client page appears.*

2. Enter required information.

3. Click **Save New Client**.

*The Client Summary page appears, with newly entered information.*



<b>Manage Client</b>	<b>Client #11982 : Edward A. Torres</b>	
» Face Sheet		
» Client Summary	<b>Client Summary</b>	
» Personal Info		
» Referrals		
» Relations		
» Insurance		
» Consents		
» Single Activity		
» Eligibility		
» Eligibility Assessment		
» Enrollments		
» Waivers		
» Services		

Primary Address:			
Primary Phone Number:			
Prefix: Select Below			
*First Name:	Edward	Middle Name:	A
Suffix: Select Below		Highest Grade Completed:	Select Below
*Date of Birth:	06/28/1990	Age:	16 Year(s) 2 Month(s) 5 Day(s)
*Social Security Number:		999-99-9999	
		Refused <input type="checkbox"/> Unknown <input type="checkbox"/>	
Date Created:	08/28/2006 04:05:36 PM	Created By:	bbillings
Date Changed:		Changed By:	
Save Changes Delete Client			

You can update Client Summary information and **Save Changes**,  
or **Delete Client**.

**Tip:** The system assigns a unique “Person/Client ID #”.

<b>Client #12054 : EWBTR EWBTR</b>				
<b>Application Summary</b>				
Application Number	Enrollment Status	Submission Date	Expiration Date	
<b>Client Summary</b>				
First Name	Middle Name	Last Name	Suffix	Type
EWBTR		EWBTR		Primary
Eddie		T		Nickname



## Module 7: Adding and Editing Client Information

---

### Client Information Overview

When managing client information you can:

- Add totally new information for a client
  - Update existing client information from the Face Sheet
- 

If clients are being screened for the first time, then the intake worker would be collecting and entering all information needed to make an eligibility determination for the particular program the incoming client is applying for in order to enroll in a program.

---

### Adding Client Information

To add client information for the first time you must enter the following information for:

1. Personal Info including:
  - a. Addresses
  - b. Phones
2. Referrals
3. Relations
4. Insurance
5. Consents

**Note:** The above information can also be updated at any time once entered.

---



## Personal Info

To add personal info:

Start from the **Applicant Face Sheet Summary** page, select **Personal Info** from the navigation bar.

*The **Addresses** page appears.*

## Adding Address Information

1. Click [add a new Address](#) link.

*The **Add Address** page appears.*

Language	Proficiency	Preferred Language	Date Created	Date Changed
No Languages found please add Language				

Client #11982 : Edward A. Torres						
Add Address						
*Address Type:	Home					
*Address Line 1:	85 Russ Street					
Address Line 2:						
*State:	MA	*City:	Boston	*Postal Code:	02108	
County:	Suffolk	EOHHS Region:	EOHHS REGION 6: BOSTON REGION			
Primary Address:	<input type="checkbox"/>	Address Restriction:	<input type="checkbox"/>			
*Effective From:	08/28/2006	Effective To:				
Comments:						

2. Enter required information.

3. Click **Save New Address**.

*The **Addresses** page reappears with the newly entered information.*

Client #11982 : Edward A. Torres						
Addresses						
Address	Type	Effective From	Effective To	Restricted	Primary	
85 Russ Street, Boston, MA, 02108	Home	08/28/2006		No	No	

| Display 1 to 1 of 1 |



## Updating Address Information (continued)

To update **Address** information:

1. Click the [Address](#) link.

*The **Update Address** page appears.*

Client #11982 : Edward A. Torres

**Update Address**

\*Address Type: Home

\*Address Line 1: 85 Russ Street

Address Line 2:

\*State: MA \*City: Boston \*Postal Code: 02108

County: Suffolk EOHHS Region: EOHHS REGION 6: BOSTON REGION

Primary Address: Address Restriction:

\*Effective From: 08/28/2006 Effective To:

Comments:

Date Created: 08/28/2006 04:07:03 PM Created By: bbillings

Date Changed: Changed By:

Save Changes Delete Address

2. Edit required information.

3. Click

**Save Changes**

*You are returned to the **Addresses** page.*

*Tip:* To remove the address entered, click **Delete Address**.



## Adding Phone Information

1. Select Phones from the navigation bar.

*The **Phones** page appears.*

<b>Personal Info</b>	<b>Client #12150 : John Smith</b>
» Addresses	
» <b>Phones</b>	<b>Phones</b>
» Email Addresses	No Phone Information found. Please <a href="#">add phone</a>
» Alternate Names	
» Demographics	

2. Click the [add phone](#) link.

*The **Add Phone** page appears.*

<b>Personal Info</b>	<b>Client #11982 : Edward A. Torres</b>																														
» Addresses																															
» <b>Phones</b>	<b>Add Phone</b>																														
» Email Addresses																															
» Alternate Names																															
» Demographics																															
	<table><tr><td>*Phone Number Type:</td><td>Home</td><td>*Phone Number:</td><td>(617)555-7278</td><td>Extension:</td><td></td></tr><tr><td>Primary Street Address:</td><td colspan="5">Select Below</td></tr><tr><td>Primary Phone:</td><td><input type="checkbox"/></td><td>Phone Restriction:</td><td><input type="checkbox"/></td><td colspan="2"></td></tr><tr><td>*Effective From:</td><td>08/28/2006</td><td>Effective To:</td><td></td><td colspan="2"></td></tr><tr><td colspan="6">Comments:</td></tr></table>	*Phone Number Type:	Home	*Phone Number:	(617)555-7278	Extension:		Primary Street Address:	Select Below					Primary Phone:	<input type="checkbox"/>	Phone Restriction:	<input type="checkbox"/>			*Effective From:	08/28/2006	Effective To:				Comments:					
*Phone Number Type:	Home	*Phone Number:	(617)555-7278	Extension:																											
Primary Street Address:	Select Below																														
Primary Phone:	<input type="checkbox"/>	Phone Restriction:	<input type="checkbox"/>																												
*Effective From:	08/28/2006	Effective To:																													
Comments:																															

3. Enter required information.

4. Click **Save New Phone**.

*The **Phones** page reappears with the newly entered information.*

<b>Personal Info</b>	<b>Client #11982 : Edward A. Torres</b>														
» Addresses															
» <b>Phones</b>	<b>Phones</b>														
» Email Addresses															
» Alternate Names															
» Demographics															
	<table><thead><tr><th>Phone Number</th><th>Extension</th><th>Type</th><th>Effective From</th><th>Effective To</th><th>Phone Restriction</th><th>Primary Phone</th></tr></thead><tbody><tr><td>(617)555-7278</td><td></td><td>Home</td><td>08/28/2006</td><td></td><td>No</td><td>No</td></tr></tbody></table>	Phone Number	Extension	Type	Effective From	Effective To	Phone Restriction	Primary Phone	(617)555-7278		Home	08/28/2006		No	No
Phone Number	Extension	Type	Effective From	Effective To	Phone Restriction	Primary Phone									
(617)555-7278		Home	08/28/2006		No	No									
Display 1 to 1 of 1															

**Tip:** You can maintain multiple phone numbers (home, cell phone, etc.).





## Updating Phone Information

To update **Phone** information:

1. Click the [Phone](#) link.

*The **Update Phone** page appears.*

2. Edit required information.

3. Click **Save Changes**.

*You are returned to the **Phones** page.*

**Tip:** To remove the phone number entered, click **Delete Phone**.

## Navigation Bar

Use this expanded navigation bar illustration to direct you through adding and updating information.



## Adding Cultural Background information

To add **Cultural Background Information**.

1. Select **Demographics** from the navigation bar.  
*Manage Demographics* navigation bar appears, with the *Cultural Background* page as the default.
2. Click [Add Cultural Background Information](#) link.

<b>Manage Demographics</b>	<b>Client #12150 : John Smith</b>
<ul style="list-style-type: none"><li>Cultural Background ▶</li><li>Languages</li><li>Employment</li><li>Household Characteristics</li></ul>	There is No Cultural Background Record Found <a href="#">Add CulturalBackground Information</a>

*Add Cultural Background* page appears.

3. Enter required information.
4. Click **Save New Cultural Background**.

*The Update Cultural Background* page appears with the newly entered information.



## Updating Cultural Background Information

Current Location: Client > Client Search > Face Sheet > Cultural Background

Manage Demographics

- Cultural Background
- Languages
- Employment
- Household Characteristics

Client #11982 : Edward A. Torres

### Update Cultural Background

\*Are you Spanish/Hispanic/Latino? Yes ☒ No ☐

\*If yes, then select from the following list:  
Puerto Rican

\*What is your race? Select one or more.

American Indian/Ala: Native	<input type="checkbox"/>	Asian	<input type="checkbox"/>	Black or African American	<input type="checkbox"/>	Native Hawaiian or other Pacific Islander	<input type="checkbox"/>
White	<input checked="" type="checkbox"/>						
Refused	<input type="checkbox"/>	Unknown	<input type="checkbox"/>	Other	<input type="checkbox"/>		

Country of Birth: Select Below

Are you a U.S. Citizen? Select Below

\*In what language do you prefer to read or discuss health related materials?  
English

Comments:

Date Created: 08/28/2006 04:08:12 PM Created By: bbillings  
Date Changed: Changed By:

Save Changes

To Update **Cultural Background Information**:

1. Edit required information.
2. Click **Save Changes**.

*A message displays, "Cultural Background Updated Successfully".*

**Note:** You cannot delete Cultural Background Information.



## Adding Languages

To add Languages:

Language	Proficiency	Preferred Language	Date Created	Date Changed
----------	-------------	--------------------	--------------	--------------

No Languages found please add Language

1. Select Languages on the navigation bar.

*The Add Language page appears.*

Client #11982 : Edward A. Torres

Add Language

Language: English

Proficiency: Select Below

Preferred Language for Discussion of Health Issues: English

2. Enter the required information.

3. Click **Save New Language**.

*The Language page reappears with the newly entered information.*



## Adding Household Characteristics

To add **Household Characteristics**:

1. Select **Household Characteristics** from the navigation bar.

*The **Household Characteristics** page appears.*

2. Click **Add Household Characteristics**.

*The **Add Household Characteristics** page appears.*

**Client #11982 : Edward A. Torres**

**Add Household Characteristics**

\*Reported Date: 08/28/2006

\*Number of Adults: 1

\*Family Income: 2500.00

\*Source of Income Support: Child Support

\*Number of Children Living in Household: 1

\*Income Frequency: Monthly

Received Income Verification: ☐

Marital Relationship Status: Never Married

Comments:

3. Enter required information.

4. **Save New Household Characteristics**

*The **Household Characteristics** page reappears with newly entered information.*

**Client #11982 : Edward A. Torres**

**Household Characteristics**

Reported Date	Household Family Size	Annual Income	Marital Relationship Status
08/28/2006	2	\$30,000.00	Never Married

Display 1 to 1 of 1



## Adding Insurance Information

To add **Insurance** information:

1. Select **Insurance** from the navigation bar.

*The Insurance page appears.*

**Insurance**

No Insurance Information found. Please [add Insurance](#)

2. Click [add Insurance](#) link.

*The Add Insurance page appears.*

**Add Insurance**

Insurance Type: Medicaid Primary Insurance: ☐

Insurance Name: Other

Insurance Policy Number: Insurance Group Number:

Effective From: 06/20/2006 Effective To:

Comments:

**Save New Insurance**

3. Enter required information.

4. **Save New Insurance**

## Editing Insurance Information

To edit **Insurance** information:

1. Select **Insurance** from the navigation bar.

*The Insurance page appears.*

Client #11982 : Edward A. Torres

**Insurance**

Insurance Name	Insurance Type	Primary Insurance
<a href="#">Other</a>	Medicaid	No

[Display 1 to 1 of 1](#)

**Add Insurance**

2. Click the [Insurance Name](#) link.

*The Edit Insurance page appears.*

3. Edit required information.

4. Click **Save Changes**

*The Insurance page reappears with the newly entered information.*



## What is a Consent?

A Consent in EIM/ESM differs from the “Consent to Serve” or “Consent to Share Data” that are used for SBHC.

In EIM/ESM a consent allows you to share client demographic or service information with another provider.

**Important:** Therefore, these consents are used to solely facilitate client referrals.

## Adding Consents

To add a **Consent**:

1. Select the **Consents** from the navigation bar.

*The Add Consent page appears.*

2. Enter required information.
3. Click **Save New Consent**

*The Consents page reappears with the newly entered data.*



## Updating Consents

To update a **Consent**:

1. Select **Consents** from the navigation bar.

*The **Consents** page appears.*

2. Click the [Consenting Person](#) link.

*The **Update Consent** page appears.*

Organization Name	Effective Date	Expiration Date	Primary
<a href="#">Test Org Name Change</a>	09/28/2006		Yes
<a href="#">School Based Health Centers</a>	09/28/2006		No

3. Edit required information.
4. Click **Save Changes**.

## Adding and Updating Client Information

When the system is unable to determine eligibility because of missing information, it provides links to forms where information can be entered.

Often, incoming clients do not present with all information needed for eligibility determination and enrollment.

If required information (demographic data collection) is missing, the system notifies the provider and supplies links to screens where the required information can be entered. Once the information is entered, the provider screens for eligibility again.

### Eligibility Results

More intake information is needed to determine eligibility for this person in the selected program. The following information is required:

[Add Insurance](#)





## Editing Client Information From the Face Sheet

Information can also be added and edited from the **Face Sheet**.

When the **Face Sheet** is displayed, the navigation bar provides categories that link to forms where information can be edited.

<b>Manage Client</b>
» Face Sheet
» Client Summary
» Personal Info
» Referrals
» Relations
» Insurance
» Consents

**Note:** Personal Information and Referrals lead to sub-menus. When you click a category on the navigation bar, a form appears. When you select Personal Info, you can access demographic and household information.

<b>Client #11982 : Edward A. Torres</b>	
<b>Client Summary</b>	
Primary Address:	
Primary Phone Number:	
Prefix: Select Below	
*First Name: Edward	Middle Name: A *Last Name: Torres
Suffix: Select Below	Highest Grade Completed: Select Below
*Date of Birth: 06/28/1990	Age: 16 Year(s) 2 Month(s) 5 Day(s) *Gender: M-Male
*Social Security Number: 999-99-9999 <input type="checkbox"/> Refused <input type="checkbox"/> Unknown	
Date Created: 08/28/2006 04:05:36 PM	Created By: bbillings
Date Changed:	Changed By:
<input type="button" value="Save Changes"/> <input type="button" value="Delete Client"/>	

Add information, and click **Save Changes**.

**Tip:** Click **Face Sheet** in breadcrumbs or on the navigation bar to return to the Face Sheet page, where you can screen for eligibility or edit other information.

<b>Current Location: Client &gt; Client Search &gt; Face Sheet &gt;</b>	
<b>Manage Client</b>	
» Face Sheet	
» Client Summary	
» Personal Info	
Primary Address: 101 Main Street Boston, MA 02118	



## Editing Client Information From the Face Sheet

In ESM, an applicant may have multiple addresses, phone number, types of insurance, referrals, relations etc. on record. Use the following process to add an information set:

1. Select the information category.
2. Click Add (Item) (item may be insurance, address, referral, etc.)

Manage Client

- » Face Sheet
- » Client Summary
- » Personal Info
- » Referrals
- » Relations
- » Insurance
- » Consents

**Insurance**

No Insurance Information found. Please **add Insurance**

3. Complete required fields on page.

**Note:** Required fields are marked with a red asterisk.

4. Click **Save (Item)**. (item may be insurance, address, referral, etc.)

» Face Sheet

» Client Summary

» Personal Info

» Referrals

» Relations

» Insurance

» Consents

» Single Activity Eligibility

» Eligibility Assessment

» Enrollments

» Waivers

» Services

**Add Insurance**

Insurance Policy Number:

Insurance Group Number:

\*Effective From:

Effective To:

Comments:

**Save New Insurance**

**Tip:** Click Face Sheet in breadcrumbs or on the navigation bar to return to the applicant's **Face Sheet**.



## Module 8: Enrolling a Client into a Program starts with Eligibility

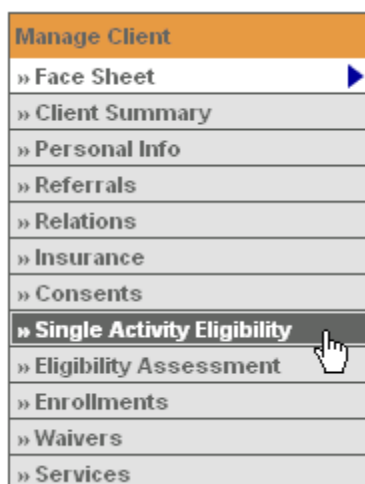
---

### Eligibility Overview

Before enrolling, the client must be determined eligible for the selected activity.

During this process, ESM compares the client's data to the eligibility rules of the activity and makes a determination.

Currently, you must use the Single Activity Eligibility feature to screen for one program at a time. In future releases, a feature will be added that allows providers to screen for multiple programs at once.



You can begin the screening process by selecting **Single Activity Eligibility** from the navigation bar.



## Single Activity Eligibility

**Note:** Enrolling a client starts with eligibility and occurs after you add a client.

To access the **Single Activity Eligibility** page:

1. Access the applicant's **Face Sheet**.
2. Click the [Single Activity Eligibility](#) link in the navigation bar.  
*The **Single Activity Eligibility** page appears.*

Select Activity Name	Type	Description
<input type="radio"/> INDIVIDUAL SUPPORT (BLANKET)	Activity	** Accounts for PCs MM1_3066 and MM3_3066 ** Services included in Flexible Individual and Family Supports are community-based, highly individualized interventions which are intended to prevent out-of-home placement, sustain the child/adolescent in his/her family's natural environment, and assist the child/adolescent in integration into the community. These services, which may be provided by a multiplicity of sources, offer supports that are not available through other DMH programs or community resources to promote the achievement of identified treatment goals. All Flexible Support programs have designated staff who are responsible for the development and monitoring of the child's Program Specific Treatment Plan and coordination Interagency Team activities, including arrangement for services approved by an Interagency Team, is also included within this code.
<input type="radio"/> COMMUNITY & SCH THER SPT	Activity	Community and School Support is an indirect service which provides consultation and assistance to the community to enable it to be supportive, capable and willing to deal with seriously emotionally disturbed children and adolescents and their families. In addition, this code includes the DMH Parent Support Program and also the parent partners and the individualized supports provided as part of the joint Department of Mental Health/Department of Social Services Collaborative Assessment Program (CAP).
<input checked="" type="radio"/> School Based Health Centers	Activity	School Based Health

Select Activity

3. Select Activity Name

4. Click **Select Activity**.

*The page expands.*

\*Contract: SBH 9999 Select Contract

5. Select a Contract from the pick list.

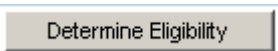
6. Click **Select Contract**.



## Single Activity Eligibility

*The page expands.*

*Enrolling Organization:	Test Org Name Change ▼	Determine Eligibility
-----------------------------	------------------------	-----------------------

7. Select Enrolling Organization from the pick list.
8. Click .


*The page reappears with Eligibility Results.*

<b>Eligibility Results</b> This person is eligible for the selected activity. This person is eligible for 365 days, ending on 09/02/2007.	Create Enrollment
-------------------------------------------------------------------------------------------------------------------------------------------------	-------------------

**Note:** This is how you determine eligibility for enrollment.

## Results of Eligibility Screening

There are three possible results of eligibility screening:

1. The applicant is determined to be eligible. Click  to enroll the applicant.
2. Additional information is needed to make a determination.
3. In this case, the system provides links to forms where information can be entered. See *Adding and Editing Client Information* module for more details. Take note if multiple links appear for eligibility results. Once, you have selected one of these links this page will not reappear. Use the left navigation bar to assess the pages needed to complete missing information that is required.

### Eligibility Results

More intake information is needed to determine eligibility for this person in the selected program. The following information is required:

[Add Insurance](#) [Add Cultural Background](#) [Add Household Characteristics](#)

## New Annual Enrollment Process/Re- Enrollment Requirements



<b>Manage Client</b>	
» Face Sheet	
» Client Summary	
» Personal Info	
» Referrals	
» Relations	
» Insurance	
» Consents	
» Single Activity Eligibility	
» Eligibility Assessment	
» Enrollments	<b>Manage Enrollment</b>
» Waivers	» Enrollment
» Services	» Enrollment Assessment
	» Enrollment Preview
	» Enrollment Update
	» Disenrollment Assessment
	» Disenrollment Preview
	» Disenrollment Update



## Create Enrollment

**Note:** The applicant must be screened through the Single Activity Eligibility process before he or she can be enrolled.

**Tip:** You can add an enrollment from the Single Activity Eligibility page or select **Enrollment** from the navigation bar.

1. Access the **Single Activity Eligibility** page and determine eligibility.

2. Click **Create Enrollment**.

*The Create Enrollment page appears.*

3. Enter **Enrollment Period Start Date**. This date must be within the last **120** days.

4. Click **Calculate Timeframe**.

*The **Enrollment Confirmation** block appears.*

5. Enter a medical record number (optional)

6. Click **Confirm Enrollment**.

*The **Update Enrollment** page appears with a message, "Enrollment Added Successfully!!!"*

**Optional:** Add comments and click **Save Changes**.

To update the Enrollment, edit required information and click

**Save Changes**.



## Accessing the Enrollments Page

**Tip:** This is a useful way to access and verify enrollment.

To view enrollments:

1. Access the **Face Sheet** page.
2. Click the [Enrollments](#) link in the navigation bar.  
*The **Enrollments** page appears.*

Client #11982 : Edward A. Torres					
Enrollments					
Enrollment ID	ActivityCode	Activity Name	Status	Start Date	End Date
<a href="#">620</a>	3422	School Based Health Centers	Active	08/28/2006	08/27/2007

**Note:** A client may have multiple enrollments for a program, but only one can be **active**.

## The Enrollment Assessment

The enrollment assessment asks additional questions that are applicant-specific. You must complete the assessment to complete the enrollment process.





## Completing an Enrollment Assessment

To complete an enrollment assessment:

1. From the **Update Enrollment** page, select **Enrollment Assessment** in the navigation bar.

*The Enrollment Assessment page appears.*

2. Enter required field information.

3. Click **Next page**.

*Additional enrollment assessment questions appear.*



## Completing an Enrollment Assessment

(continued)

4. Enter required field information.

*The enrollment assessment is complete.*

5. Click **Submit survey**.

*The Enrollment Assessment page appears with a message, "The assessment has been completed successfully."*

### Enrollment Assessments

**The assessment has been completed successfully.**

#### *Notes:*

- After the enrollment process is completed, the applicant now becomes an active client.
- If the assessment is incomplete, the system will require you to return to the initial assessment page to start from the beginning.



## Disenrolling a Client

A client is automatically enrolled for a year. During that year, however, the client may drop the program or become ineligible due to changes in income, insurance, etc. When that happens, the enrollment should be *closed*.

To close an enrollment:

1. Access the **Enrollments** page.
2. Click the link for the enrollment you wish to close.

*The **Update Enrollment** page appears.*

Update Enrollment			
Enrollment ID:	621	Enrollment Status:	Closed
Medical Record Number:	242630	Disenrollment Reason:	Became income ineligible
Enrollment Start Date:	08/25/2006	Enrollment End Date:	08/24/2007
Enrolling Corporation:	Provider Billing Org 9999		
Enrolling Facility:			
Comments:			
Date Created:	08/29/2006 10:48:27 AM	Created By:	bbillings
Date Changed:		Changed By:	
<div>Save Changes</div>			

3. Edit the necessary information.
  - Mark enrollment status closed.
  - Select reason for disenrollment.
  - Optional: enter comments.
4. Click **Save Changes**.

*The **Update Enrollment** page appears.*



## **Re-enrolling a Client**

To re-enroll a client:

1. Check basic Demographic information (address, phone, etc.)
2. Update Demographic information if necessary
3. Enter Single Eligibility Activity
4. Create Enrollment
5. Enter Enrollment Assessment

**Note:** When performing steps 3 -5, you are repeating the initial enrollment process.

---




## Module 9: Adding Services





To record services, users must be in a specific service plan for a specific client. To begin recording services, a client's service plan must first be found or created if one does not exist.

**Note:** All services entered will be professional services.




### Adding Service Plans

To add a service plan:

1. Access the **Clients** page.  
*The **Client Search** page appears.*
2. Enter search criteria.
3. Click .  
*The Search Results appear below the search criteria.*
4. Click the [Client](#) link.  
*The **Applicant Face Sheet Summary** page appears.*
5. Click **Services** from the navigation bar.  
*The **Service Plans** page appears.*

Service Plans			
Service Plan Version:	<input type="text"/>		
Service Coordinator First Name:	<input type="text"/>		
Service Coordinator Last Name:	<input type="text"/>		
Service Plan Org Association:	<input type="text" value="Select Below"/>	Service Plan Status:	<input type="text" value="Select Below"/>
First Service Delivery Date:	<input type="text" value=""/> 	Effective From Date:	<input type="text" value=""/> 
 			

6. Click .  
*The **Add Service Plan** page appears.*

Add Service Plan			
*Service Plan Org Association:	<input type="text" value="Select Below"/>		
*Effective From:	<input type="text" value="09/27/2006"/> 	Effective To:	<input type="text" value=""/> 
Comments:	<input type="text"/>		
			

**Note:** Search from this page to determine whether a service plans exists for the client.



## Adding Service Plans

(continued)

7. Enter plan details, making sure to populate all required fields.

### *Notes:*

- The **Effective From** and **Effective To** date fields are very important. The system verifies that all tasks, services or notes associated with the service plan fall within the effective dates.
- The system does not allow two active service plans of the same type to exist for an individual client.

8. Click **Save New Service Plan**.

*The Service Plan Summary page appears.*

**Tip:** If a plan was created in error, it can be deleted from this page (assuming all plan contents have been deleted or have an Error status).

## Service Delivery Data Tips: ACRU

There are several key activities that typically comprise entering service records:

1. Add professional service
2. Complete appropriate assessment, as required
3. Report results or diagnosis
4. Update service status

A service plan is now prepared to be billed.

**Note:** Not all professional services will require screening assessments, results, and/or final diagnoses.

## Adding Professional Services

To add a professional service:

1. Access the **Service Plan Summary** page.
2. Select **Services** from the navigation bar.

*The Service Plan Calendar page appears.*



» Service Plan Calendar  
» Service Plan Summary  
» Plan Notes  
» Tasks  
» Assigned Resources  
» Cases  
» Services  
» Service Plans  
» Final Diagnoses  
» Service Plan Assessments  
» Add New Service Plan  
» Authorization Requests

Service Plan ID: #523 Version 1    Effective From: 08/29/2006    Effective To:

**August 2006**

Day	Service Plan Tasks	Case Tasks
1		
2		
3		
4		
5		
6		
7		
8		

**View Records**  
Year: 2006 \*  
Month: August \*  
Retrieve

**Manage Service Plan**  
Add Plan Note  
Add Appointment  
Add Planned Service  
Add Standard Task  
Add Task From Template  
Add Milestone  
Add Professional Service  
Add Institutional Service  
Add Resource  
Add Case

3. Select **Services** from the navigation bar.  
*The Service Search page appears.*

» Service Plan Calendar  
» Service Plan Summary  
» Plan Notes  
» Tasks  
» Assigned Resources  
» Cases  
» Services  
» Final Diagnoses  
» Service Plan Assessments

Service Plan ID: 523    Effective From: 08/29/2006    Effective To:

**Service Search**

Service Code: Select Below    Diagnosis Description:   
Service From:     Service To:   
Status: Select Below    Search

**Search Results**

Service Code	Service Date	Service Type	Diagnosis Code	Provider	Status
<a href="#">99214</a>	08/29/2006	professional	784.0 - HEADACHE 787.02- NAUSEA ALONE	Provider Billing Org 9999	Draft
<a href="#">MEH</a>	08/29/2006	professional		Provider Billing Org 9999	Draft
<a href="#">CRRA</a>	08/29/2006	professional		Provider Billing Org 9999	Draft

| Display 1 to 3 of 3 |

Add Professional Service    Add Institutional Service

4. Click **Add Professional Service**.  
*The Add Service page appears.*

» Service Plan Calendar  
» Service Plan Summary  
» Plan Notes  
» Tasks  
» Assigned Resources  
» Cases  
» Services  
» Final Diagnoses  
» Service Plan Assessments

Service Plan ID: 523    Effective From: 08/29/2006    Effective To:

**Add Professional Service**

\*Service Code: 69210 :Remove impacted ear wax    Select Service Code  
\*Rendering Provider: Provider Billing Org 9999    Select Provider  
Rendering Clinician: Select Below    Taxonomy Code: Select Below  
Laboratory/Facility: Provider Billing Org 9999  
\*Facility Code: 11 Office  
\*Service Date:   
\*Units: 1    \*Unit Type: Minutes  
Save New Service

**Tip:** The [Add Professional Service](#) link may also be accessed from the **Service Plan Calendar** view.

5. Select a **Service Code**.



---

*Additional data entry fields appear.*

6. Select a **Rendering Provider**.  
*Additional data fields appear.*
  7. Enter service details, making sure to populate all required fields. Marked with red asterisk.
  8. Click **Save New Service**.  
*The **Service Summary** page appears with a message stating that the record has been successfully saved.*
- 

## Adding a Diagnosis

To add a diagnosis:

1. Access the **Service Summary** page.
  2. Click **Add Diagnosis**.
- The **Diagnosis Search** page appears.*
3. Enter **Description** in textbox.

**Tip:** If your search results do not generate the expected results, use a % before key words.

4. Click **Search**.  
*The search results appear below service search.*
  5. Click **Save Diagnosis**.  
*The **Service Summary** page appears with the **Diagnosis Code** displaying.*
  6. Update Status to **Reported**.
  7. Click **Save Changes**.  
*The record has been saved.*
-





## Completing a Screening Assessment

A Screening Assessment may be completed in conjunction with adding a Professional Service. If the assessment is incomplete, the system will require you to return to the initial assessment page to start from the beginning.

To complete a screening assessment:

1. Access the **Service Summary** page.
2. Select **Screening Assessment** in the navigation bar.

*The **Screening Assessment** page appears.*

3. Select Assessment Name.
4. Click **Complete Assessment**.

*An additional **Screening Assessment** page appears.*

5. Click **Next page**.

*A **Screening Assessment** page appears stating the assessment is complete.*

6. Click **Submit survey**.

*The **Assessments** page appears with a message, “the assessment has been completed successfully”.*

## Recording Service Results

To record a service plan assessment:

1. Access the **Service Plan Calendar** page.
2. Select **Service Plan Assessments** from the navigation bar.

The **Service Plan Assessment** page appears.

Service Plan Assessments	
Select Assessment Name	
<input type="text" value="ServicePlan"/>	
<button>Review Assessment</button>	<button>Complete Assessment</button>

3. **Complete Assessment**.

*The **Service Plan Assessment** form appears.*



## Recording Service Results

(continued)

**Service Plan Assessments**

Service plan coordinator:

Confidential Visit?  
☐ Yes ☐ No

Height (inches):

Weight (lbs):

BMI (*Weight in pounds/Height in inches X 703*) =

BMI Percentile:

Lab Tests/Orders  
SELECT APPROPRIATE  
RESULT FOR EACH  
ORDERED LAB/TEST

	Normal	Abnormal	Invalid Specimen
80048 ?? Basic metabolic panel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. Complete assessment.

5. Click .

*The **Service Plan Assessment** page reappears with the assessment completed successfully.*

**Updating Status** For SBHC update status to Reported.



## Module 10: Managing Service Plans

### Managing Service Plans: Assigned Resources

Authorized users can maintain resources for a client's service plan. The resources assigned to the client's cycle of care can then be referenced as part of a particular task, appointment or scheduled procedure.

To add an assigned resource:

1. Access the **Service Plan Calendar** page.
2. Click **Assigned Resources** on the navigation bar.  
*The **Assigned Resources** page appears.*
3. Click [Add Resource](#) link.  
*The **Add Assigned Resource** page appears.*

**Add Assigned Resource**

Last Name:

First Name:

Specific Suborganization:

Staff Group:

Staff Type:

**Search Results**

Select	Name	Organization Legal Name	Default Staff Type	Status
<input type="radio"/>	chris billings	Provider Billing Org 9999		Active
<input type="radio"/>	ann billings	Provider Billing Org 9999		Active
<input type="radio"/>	Bob Billings	Provider Billing Org 9999		Active

Service Coordinator ☐

**Note:** A resource search may be conducted based on the resource's last name, specific sub-organization, and staff group or staff type.

4. Select the desired resource in the **Search Results**.
5. Select the **Service Coordinator** check box to identify the resource as a Service Coordinator, if desired.
6. Click **Save New Assigned Resource**.  
*The **Assigned Resources** page appears with the new resource.*





## Module 11: Reporting

### Introduction

Typically, reports are generated by an authorized user who chooses report content and format as part of submitting a reporting request.

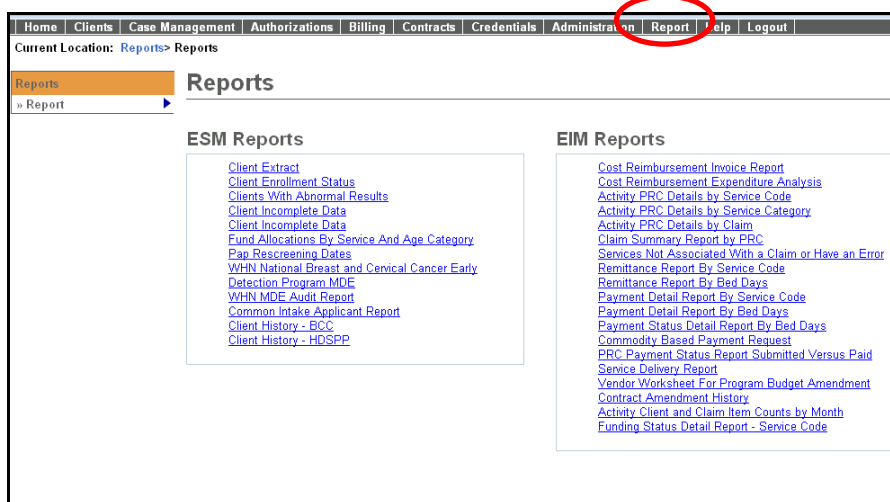
### Key Terms

The following terms will help in understanding how reports function:

- **Service Management Reports:**  
*Reports related to ESM functionality*
- **Financial Management Reports:**  
*Reports related to EIM functionality*
- **Report Selection Criteria:**  
*Parameters/filters a provider enters when requesting a report*
- **Report Output Format:**  
*Reports can be created as Excel, PDF, or HTML files*
- **Report Frequency:**  
*Reports in EIM/ESM are scheduled on-demand*

### Accessing the Reporting Feature

To access the reporting feature of EIM/ESM: Access the **Reports** module. A list of Financial and Service Management reports appears.



**Note:** Access to reports is based on user security roles.



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**Reports  
Catalog**

The table below lists the reports available in ESM.

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Report Name	Purpose
Client Extract Report	Provides a list of demographic data elements regarding clients that are scheduled for follow-up
Services Not Associated With a Claim or Have an Error	Provides a list of all services that are in draft or ready state that have not been associated with a claim or services that have been rejected
Enrollment Status Report	Provides a list of clients enrolled within some specified timeframe
Clients with Abnormal Results	Identifies clients with abnormal test results that require monitoring or follow-up
Activity Client and Claim Item Counts by Month	Provides a monthly count of clients currently enrolled and the number of claims and claim items submitted on behalf of those clients



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## Entering Report Criteria

Criteria selection tailors report results. By entering criteria, a user can determine the details and grouping of the report data. Criteria include dates, programs, locations, and contract numbers.

To enter criteria and run a report:


1. Access the **Reports** module.  
*A list of Financial and Service Management reports appear.*
2. Click the [name of the individual report](#) link.  
*A **Report Criteria** page appears.*

**Note:** The **Report Criteria** page will differ depending upon the specific report being requested.

3. Enter criteria.  
**Important:** Report criteria is not printed on the report or preserved in the system. Users may find it helpful to record criteria manually.

4. Select **Report Format**.

5. Click .  
*A file is generated that users may save for later viewing.*

**Tip:** Click  to clear out report criteria entered.

---



## Enrollment Status Report

Client Enrollment Status Report	
*Report Format: PDF <input checked="" type="radio"/> Excel <input type="radio"/>	*Date Type: <input type="text" value="Select Below"/>
*Period Start Date: <input type="text" value="07/01/2006"/>	*Period End Date: <input type="text" value="09/07/2006"/>
*Activity: <input type="text" value="Select Below"/>	
Organization Type: <input type="text" value="Select Below"/>	<input type="button" value="Select Organization"/>
Services Received?: <input type="text" value="Select Below"/>	
Federally Paid Service?: <input type="text" value="Select Below"/>	
Disenrollment Reason:	<div>3 Years of Age Acquired Medicare Part B Acquired Insurance Administrative/Non-compliance Assessment Only</div>
<input type="button" value="Run Report"/> <input type="button" value="Clear"/>	

## Trouble - Shooting

Problem	Possible solutions
Why am I not getting the results I expected?	<ul style="list-style-type: none"><li>• Double-check that criteria filters are correct</li><li>• Consider user security</li></ul>
Why doesn't this match my legacy reports?	<ul style="list-style-type: none"><li>• Double-check that criteria filters are correct</li></ul>
Why Can't I run the Personnel Summary Report (PSR)?	<ul style="list-style-type: none"><li>• EIM/ESM Application is able to run this report only when the Internet Explorer Pop-up blocker has been turned off.</li></ul>

**Note:** Based on an organization's management, different results will display.